



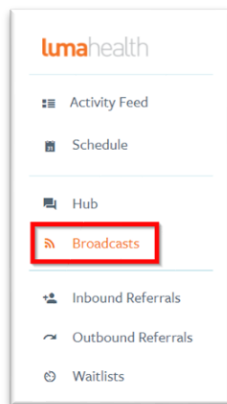
## How to: Send Scheduled Broadcast Messages

### Overview

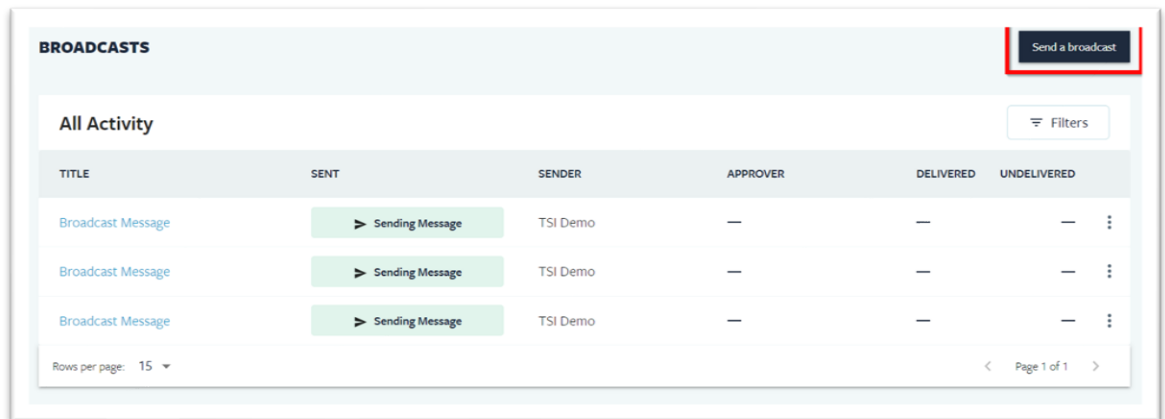
One of features available to you within Luma Health is the ability to broadcast a message to scheduled patients. We will now take a look into how one could best utilize this function!

### How do I navigate to the Broadcasts page?

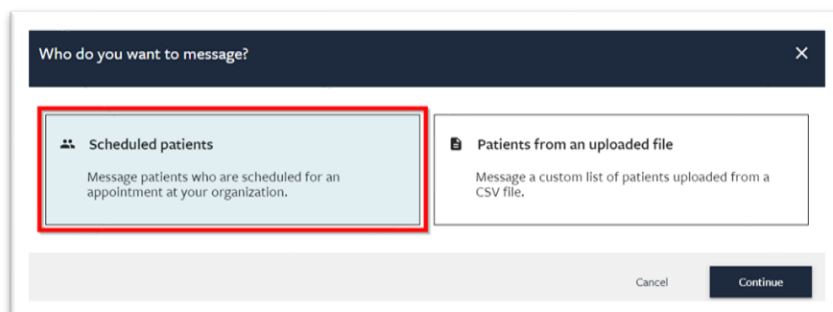
- Login to your Luma Health account.
- Select *Broadcasts* from the left navigation bar.



- It will lead to the main broadcast screen where you'll see an option to **Send a Broadcast** in the upper right-hand corner:



- In this instance, we are sending broadcasts to **Scheduled Patients**.

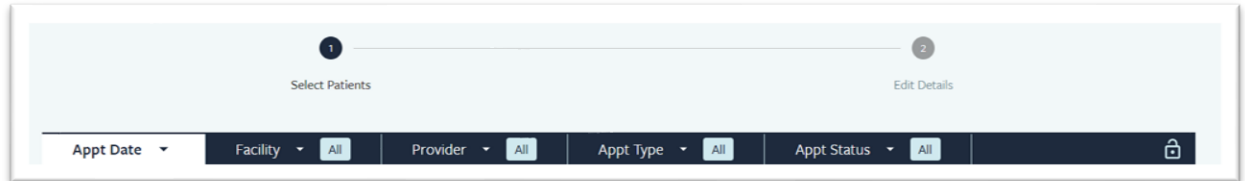




## How to: Send Scheduled Broadcast Messages

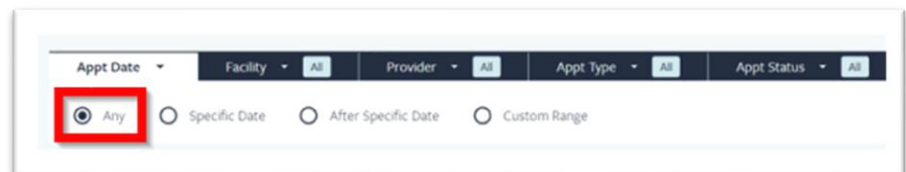
### How do I filter the patient list for Broadcasts?

- We have a variety of filters that we can choose from:

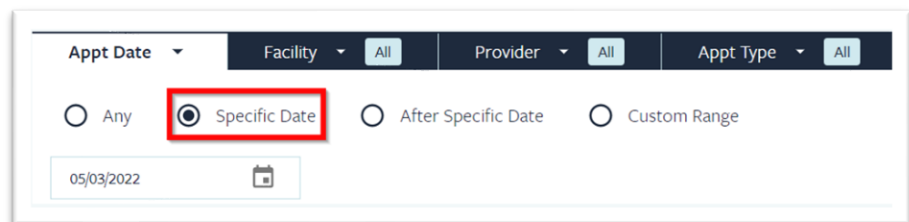


- **Appt Date:**

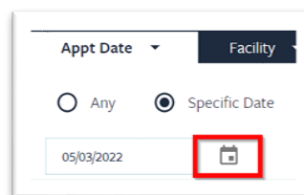
- **Any** - pulls patients starting with today and includes any scheduled patients through the next 180 days.



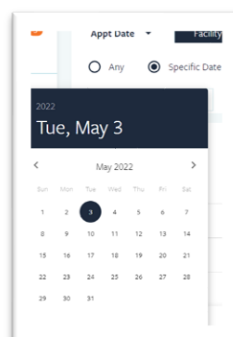
- **Specific Date** - defaults to today; will need to be changed if there is another date that needs to be selected.



- Select the calendar icon in order the change the date



a.



b.



## How to: Send Scheduled Broadcast Messages

- **After Specific Date** – Luma will send out messages to patients scheduled *after* that specified time. Choosing “after a specific date” rather than on a “specific date” will allow you to also set a time.

Appt Date ▾ Facility ▾ All Provider ▾ All Appt Type ▾

Any
  Specific Date
  After Specific Date
  Custom Range

05/03/2022 11:59 PM 📅



Appt Date ▾ Facility

2022  
May 3 11:59 AM  
PM

May 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				



- This is useful for when you have providers that are retiring, leaving the practice, or going on maternity leave; and you need to reach out to all patients after a specified date that they will now be seeing a different healthcare provider
  - a. **Note:** keep in mind that Luma only syncs in 6 months/180 days to the schedule

- **Custom Range** – Allows you to send messages within a specific timeframe.

Appt Date ▾ Facility ▾ All Provider ▾ All Appt Type ▾

Any
  Specific Date
  After Specific Date
  Custom Range

04/26/2022 12:00 AM 📅 to 05/03/2022 12:00 AM 📅



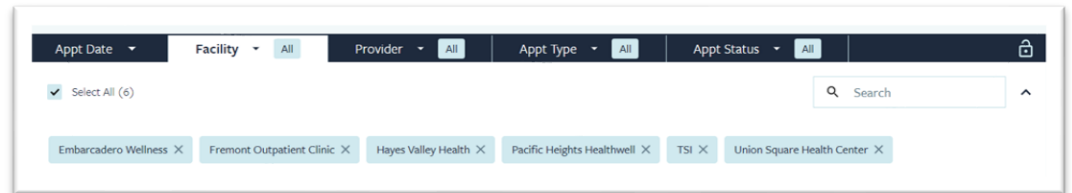
- a. Here you have two calendar buttons in which you set both a date and time for the appointment window that you would like to send out a broadcast for.



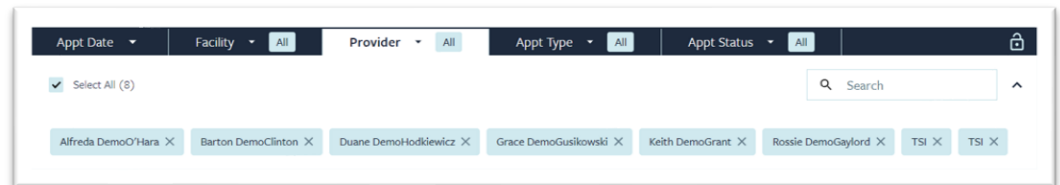
## How to: Send Scheduled Broadcast Messages

- Examples of the custom range filters use could include the following:
  - a. If you have a provider that's going on vacation and you need to let patients know to reschedule.
  - b. Reaching out to patients scheduled for today within a specified timeframe (8:00am & 10:00am) to inform them that their provider is running late.

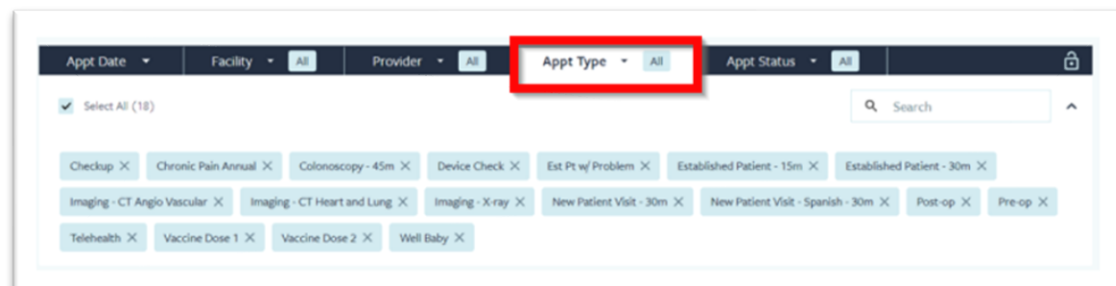
- **Facility:** If your practice has multiple facilities, you can specify which facilities you'd like to send the broadcast to.



- **Provider:** Similar to the facility filter, you can determine which providers you need to reach out on behalf of.



- **Appointment Type:** Allows us to do the same as facility or provider and select specific appointment types:



- Choose the appointment types in which you would like filter patients by.
  - Example: *Let's say we need to send a broadcast to any patients scheduled for an Imaging appointment because the machine that you use to conduct these appointments is down.*



## How to: Send Scheduled Broadcast Messages

### ○ Appt Status:

Appt Date ▾ Facility ▾ All Provider ▾ All Appt Type ▾ All **Appt Status ▾ All**

Select All (5)

Cancelled X No show X Confirmed X Arrived X Unconfirmed X

Appt Date ▾ Facility ▾ All Provider ▾ All Appt Type ▾ All Appt Status ▾ 2

Select All (5)

Cancelled No show **Confirmed X** Arrived **Unconfirmed X**

- We have found that typically, most practices only want to send broadcasts to patients who are **confirmed** or **unconfirmed** as these are the patients that are still expected to show up to an appointment.
  - *If this is true for your practice, there is a lock on the far right-hand side which will keep enabled whatever filter you currently have selected.*

### ○ Note:

- All broadcast filters will default to "0". You will need to choose the facilities, providers/resources, appointment types, and appointment statuses that need to receive the broadcast message.

Facility ▾ 0 Provider ▾ 0 Appt Type ▾ 0 Appt Status ▾ 0

## How do I select the patients needed for my Broadcast?

- Once you are happy with the filters you have set up, you will see patients populated in the window below:

○

Appt Date ▾ Facility ▾ 1 Provider ▾ 1 Appt Type ▾ All Appt Status ▾ 2

Select All (5)

Cancelled No show **Confirmed X** Arrived Unconfirmed X

	NAME	CONTACT	DOB	APPT DATE	FACILITY	PROVIDER	APPT TYPE	APPT STATUS
<input type="checkbox"/>	Santino DemoMertz	Barrett7@gmail.com@example.com	Oct 26, 1959	May 3, 2022 3:00 PM	Fremont Outpatient Clinic	Rossie DemoGaylord	Colonoscopy - 45m	unconfirmed
<input type="checkbox"/>	Zander DemoAbbott	Anabelle.Reynolds@hotmail.com@example.com	Oct 6, 1978	May 6, 2022 4:00 PM	Fremont Outpatient Clinic	Rossie DemoGaylord	Vaccine Dose 2	unconfirmed
<input type="checkbox"/>	Ray DemoBode	Jadyn.Mertz@hotmail.com@example.com	Mar 27, 1944	May 3, 2022 3:00 PM	Fremont Outpatient Clinic	Kieth DemoGrant	Device Check	unconfirmed
<input type="checkbox"/>	Brenna DemoOlicki	Patricia15@gmail.com@example.com	Mar 5, 1974	May 11, 2022 9:00 PM	Fremont Outpatient Clinic	Rossie DemoGaylord	Device Check	unconfirmed
<input type="checkbox"/>	Nico DemoFay	Louisa.Beehan@yahoo.com@example.cc	Mar 26, 1985	May 5, 2022 3:00 PM	Fremont Outpatient Clinic	Rossie DemoGaylord	New Patient Visit - Spent 9h...	confirmed



## How to: Send Scheduled Broadcast Messages

- You can either go through and select patients individually, or select all patients via the *Select All* checkbox in the top left.

NAME	CONTACT	DOB	APPT DATE	FACILITY
<input type="checkbox"/> Santino DemoMertz	Barrett7@gmail.com@example.com	Oct 28, 1959	May 3, 2022 3:00 PM	Fremont Outpatient Clinic
<input type="checkbox"/> Zander DemoAbbott	Anabelle.Reynolds@hotmail.com@example.com	Oct 6, 1978	May 6, 2022 4:00 PM	Fremont Outpatient Clinic

- Click **Next** in the bottom right-hand corner in order to enter the details for the broadcast message

NAME	CONTACT	DOB	APPT DATE	FACILITY	PROVIDER	APPT TYPE	APPT STATUS
<input checked="" type="checkbox"/> Santino DemoMertz	Barrett7@gmail.com@example.com	Oct 28, 1959	May 3, 2022 3:00 PM	Fremont Outpatient Clinic	Rosie DemoGaylord	Colonoscopy - 45m	unconfirmed
<input checked="" type="checkbox"/> Zander DemoAbbott	Anabelle.Reynolds@hotmail.com@example.com	Oct 6, 1978	May 6, 2022 4:00 PM	Fremont Outpatient Clinic	Rosie DemoGaylord	Vaccine Dose 2	unconfirmed
<input checked="" type="checkbox"/> Ray DemoBode	JodyMertz@hotmail.com@example.com	Mar 27, 1944	May 3, 2022 3:00 PM	Fremont Outpatient Clinic	Kath DemoGrant	Device Check	unconfirmed
<input checked="" type="checkbox"/> Brenna DemoDicki	Patricia15@gmail.com@example.com	Mar 5, 1974	May 11, 2022 9:00 PM	Fremont Outpatient Clinic	Rosie DemoGaylord	Device Check	unconfirmed
<input checked="" type="checkbox"/> Nico DemoFay	Louise.Beaher@yahoo.com@example.com	Mar 29, 1985	May 5, 2022 3:00 PM	Fremont Outpatient Clinic	Rosie DemoGaylord	New Patient Visit - Spanish - ...	confirmed
<input checked="" type="checkbox"/> Precious DemoWilliamson	Donakon_Pfeiffer@gmail.com@example.com	Jul 7, 1962	May 3, 2022 3:00 PM	Fremont Outpatient Clinic	Berton DemoClinton	New Patient Visit - 30m	unconfirmed

### How do I set up the verbiage for my Broadcast Message?

- When creating a broadcast message, you will have a variety of details that you will be required to input.



## How to: Send Scheduled Broadcast Messages

- **Title:**

**Broadcast Title**

Dr. Jane Doe OOO December 6th through December 10th

**Message**

This message will be used by default to contact patients by all methods (SMS, email, and voice) used at your organization. Be sure to phrase the message so that it can be understood regardless of the communication channel.

Enter message

Required

Default

+ Add message override

**Timing**

Send now  Send later

- - This is not something that your patients will ever see; this is just for your practice records so you'll want to be as specific as possible - this is so that when you're going through your broadcast archive you don't have to open each one and read the message to know what it was in regards to.
    - Example: *Dr. Jane Doe OOO December 6th through December 10th*

- **Message:**

**Broadcast Title**

Dr. Jane Doe OOO December 6th through December 10th

**Message**

This message will be used by default to contact patients by all methods (SMS, email, and voice) used at your organization. Be sure to phrase the message so that it can be understood regardless of the communication channel.

Hi {{patient.firstname}}, your appt with {{provider.name}} on {{appointment.date}} needs to be rescheduled as your provider will be out of the office. Please call our office at {{facility.phone}} to reschedule.

Default

+ Add message override

**Timing**

Send now  Send later

- - This is where you type in what you would like the patient to receive:
    - Example: *Hi {{patient.firstname}}, your appt with {{provider.name}} on {{appointment.date}} needs to be rescheduled as your provider will be out of the office. Please call our office at {{facility.phone}} to reschedule.*
  - Users who have been granted admin or manager privileges will be allowed to free-text broadcast messages, whereas sub-account users will require broadcast approval by an admin or manager.



## How to: Send Scheduled Broadcast Messages

- Additionally, users may choose pre-written messages from the **message library**:

- We can utilize squigglyies in order to personalize our broadcast messages.
  - Ensure that when using squigglyies, such as `{{provider.name}}`, that the resource in Luma is named in a manner that will make sense to the patient - If the resource is called Infusion Chair, this may not make sense in context of the message that you are sending.
- **Broadcasts will send out to all patients regardless of their contact methods (SMS, email, phone).**
  - The example message that we are using above will work just fine for text or email, but the phone message will be unable to accurately pronounce any abbreviations such as appt.
    - We could either spell out the abbreviations (ex: appt will be appointment), or we could set up an override using the button, titled *Add Message override*, directly beneath the message window.
  - **Adding an Override:**

○





## How to: Send Scheduled Broadcast Messages

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- Select contact method – *in this example we are creating an override for patients with **voice** as their contact method.*

▪

- Note: *when creating an override for patients with **email** as their contact method, it will ask for an email subject. This will default to your broadcast title, so you will likely want to change it to something more appropriate for the patient to receive.*

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## How to: Send Scheduled Broadcast Messages

- Select the contact language dropdown – *this will be whatever language the message you have written is in.*

- Copy & paste our message from above into this window and then update any abbreviations to their full spelling for the phone to pronounce.
  - In our message example, we would update *appt* to *appointment*.

### How do I setup the timing for my Broadcast Message?

- **Timing:**
  - We can send this message **now** or we can send it **later** at a specified date & time
    - *Send Now will be selected as default.*

-



## How to: Send Scheduled Broadcast Messages

- **Important Note:** *If you leave the timing on Send now, it will send to patients at that current time (does not respect Luma's quiet hours). Example: if we are creating a broadcast message 10pm, it will send to patients at 10pm.*
- *Send Later will allow the user to select a time frame for the broadcast to go out.*

- 
- **NOTE:** *If send later is selected, you cannot choose a time during your practice's quiet hours. You can only schedule the broadcast message to send out at most 7 days from the current date.*

### Final Broadcast Review Before Sending Message:

- Press **send**:

- 
- It will open a window that will allow for us to review the message before it broadcasts to patients; Confirm all information is correct, then choose **Process this Broadcast**



## How to: Send Scheduled Broadcast Messages

**Confirm Broadcast**

Review your messages below, then click **Process the broadcast** to send these messages to Luma Health for approval. Once approved, these messages will be automatically sent to patients. Note that:

- Patients who recently received a broadcast within 1 hour will not receive these messages.

**Default**

Hi {{patient.firstname}}, your appt with {{provider.name}} on {{appointment.date}} needs to be rescheduled as your provider will be out of the office. Please call our office at {{facility.phone}} to reschedule.

**Override 1** Contact method: Voice    Message language: English

Hi {{patient.firstname}}, your appointment with {{provider.name}} on {{appointment.date}} needs to be rescheduled as your provider will be out of the office. Please call our office at {{facility.phone}} to reschedule.

Cancel    Process the broadcast

- Once the broadcast has finished processing, we will be brought back to the initial broadcast screen.

BROADCASTS						Send a broadcast
All Activity						Filters
TITLE	SENT	SENDER	APPROVER	DELIVERED	UNDELIVERED	
Dr. Jane Doe OOO December 6th through Decembe...	▶ Sending Message	TSI Demo	-	-	-	⋮

- Here we can see a variety of details regarding the broadcasts that have been sent:
  - The **title** of the broadcast that we just sent.

All Activity	
TITLE	
Dr. Jane Doe OOO December 6th through Decembe...	

Rows per page: 15

- The **date & time** the broadcast was sent.

All Activity		
TITLE	SENT	SENDER
Dr. Jane Doe OOO December 6th through Decembe...	May 3, 2022 5:04 PM	TSI Demo

Rows per page: 15



## How to: Send Scheduled Broadcast Messages

- Who **sent** the broadcast.

SENT	SENDER
May 3, 2022 5:04 PM	TSI Demo

- 
- Who **approved** it (if the broadcast was sent by a sub-account user).

APPROVER	DELIVERED	UNDELIVERED
—	29	0

- 
- The number of patients that the broadcast was delivered to.

DELIVERED	UNDELIVERED
29	0

If you have any questions regarding the information in this document, please contact [helpdesk@tsihealthcare.com](mailto:helpdesk@tsihealthcare.com)